

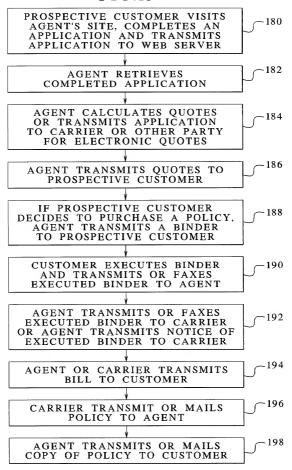
EXAMPLES OF ELECTRONIC INSURANCE TRANSACTION DOCUMENTS

- 1. Agent Contact Form for Customer
- 2. Marketing Mailers
- 3. Policy Applications
- 4. Policy Quotes5. Policy Binders
- 6. Issued Policies
- 7. Policy Tracking Reminders and Forms
- 8. Claims
- 9. Invoices
- 10. Other Documents

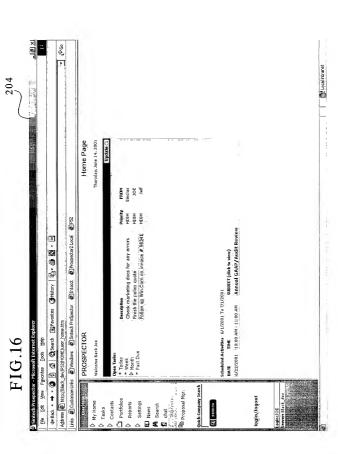
FIG.14

EXAMPLES OF SYSTEM TOOLS

- 1. Contact Information
- 2. Account Creation
- 3. Policy Creation
- 4. Invoicing
- 5. Payment Entry and Tracking
- 6. Reporting
- 7. Statements
- 8. Searching
- 9. Messaging
- 10. Interfacing to Existing Accounting System
- 11. Customization



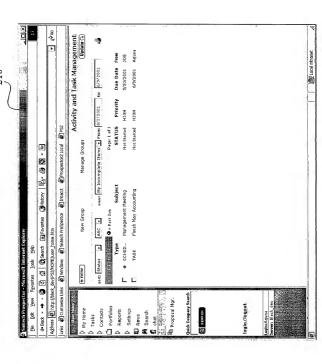
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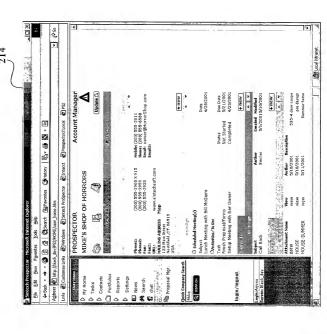
FIG.17

	+ new			Delete	-
EIG 18	(Primary Contact in BOLD)				
01.1	Sort Name	Professional Title	Last Name	First Name	Department
	■ 「Bobby,Melissa	Analyst	Bobby	Melissa	Intelligence
	⊕ Γ Goodman,John	Producer	Goodman	John	Sales
	■ 「 Paxton,Bill	CPA	Payton	Bill	Accounting
	⊞ F Shore, Sally	QI,	Shore	Sally	Legal



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ma i AM C p ma i L o find status	Activity Type:		
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	This invoice	s past due, please call to find status	न
		• 1	F
	Last Modified: 5	/31/2001 10;26;59 AM	-
	Close	Update	

FIG.20



Local intranet

	Proposal/Polic	Proposal/Policy Editor - Microsoft Internet Explorer	t Explorer		- 1	X III
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	Add/Edit Proposi	Add/Edit Proposal/Policy Information				
	JMHII Construction	struction				1.2.
	Proposal Information	ation	Policy Details			
IG.23	Proposal Title:	TEST				
	Producer	Select		Date: 4/6/2001	15	
	Agency:	SINCLAS AGENCY TEST	_		Look Up	4
	Line:	PC			Look Up	4

Look Up

Pending •

Decision

--Select-- 🔻 4/1/2001

Follow-Up Date:

Quote: Reason

Quote Emp. Date: 4/1/2001

Mutual Insurance Company

▼ Quoted
Carrier Name:

5555

By: --Select--By: --Select--By: --Select--

> 4/1/2001 4/1/2001

Date Date:

☑ Info. Rec

Date: 4/1/2001

Line: V Info. Sent

4 (1200)

Close

Save

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	POLICY INFORMATION	ORMATION	RATING INFORMATION
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Workers Comp (States)	p (States)		select states
Employer's Liability	iability		EACH ACCIDENT
			DISEASE-POLICY LIMIT
			DISEASE-EACH EMPLOYEE
Other States			select states
Deductible			
MEDICAL		2 .	Amount
INDEMNITY			Amount
OTHER COVERAGES	FRAGES		
☐ U.S.L. & H	I	MANAGED CARE OPTION	
L N	COLLINTARY COMP	FOREIGN COVERAGE	

	aranab,		Sidner altrige		Sellistes.
GENERAL				DATE	6/5/2001
Policy Number:	p90878-45678	Eft. Date:	6/5/2001	Enp. Date:	6/5/2002
o r :03 807	AUTO	Act #	100	Opinect	C Agency
Enter the status of this policy	of this policy	1		1 (2 801)	100
Packet Sent:	Σ	6/5/2001	☑ Bound Premium:	Premium:	1525.65
Plan Proposedi	<u> ></u>	6/5/2001	T Lock		
Decision Pending:	L		Reason		
Declined	Σ	6/5/2001	Reason: Declined	Declined	
ASSIGNMENT					
Agency:	GOOD AGENCY		Agent		
Brokeri	McComb&Wilson		, MGA:		
Carrier:	Hartford		Producer:		
NOTE:					
Close A	Acord Form	Endorsement/History	History	Quote	Update

FIG.25

2 Invoice Editor - Microsoft Internet Explorer	net Explorer			
PROSPECTOR Invoice Editor	Editor			PAST DUE
Add/Edit Invoice information. Click on Salect Policy to wew/hide additional Policy Information.	ck on Select Po	licy to wew/hide	additional Polic	y Information.
General	Accou	Accounting		
Select Policy: Test2		ď	Producer Test User	
Premium: 1005 At	Auto Generate Invoice Number	oice Number	Invoice #1	010101
Type: RNW -	Billing: Producer Bill	r Bill	Branch: San	San Francisco 🔹
Inv. Date: 1/22/2001	Due Date: 2/	2/15/2001	Effective Date:	1/22/2001
Commissioni		Fees:		
Broker Pct: 15 Broker Comm.:	150.75	Policy Fees	100 Carrier Fee:	er Fee: 0
Agent Pcts 12.5 Agent Comm.:	125.63	Inspect. Fee:	0 Others	-
Gross Pct 27.5 Gross Commi	276.38	Exp. Const:	Exp.	ر د %:
Monthly Earned Commission:		Taxes:		

Look Up

Testing Inv Num

728.62 0 728.62

979,37 Balance Due Carrlers

Amount Received: Balance Due: Calculate Preview Update

100 Total Taxes: 979,37 Due Carrier: 0 Amount Paid:

Note:

Mutual Insurance Company

RECEIVABLE (Purchaser): ABC Grill

Total Broker Amounts PAYABLE (Provider):

Total Fees: Net Due:

0 Fire Marshall:

ther Fee SL Tax:
150.75 Stamping Fee:

1. Montly Comm: 150.75

Months:

T Include Policy Fee T Include Other Fee

0 SL Filing:

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	of Department of	1- Joueur - 1	Payment Manager - Microsoft Internet Explorer			×
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	PROSPE	CTORP	PROSPECTOR Payment Manager			e (7)
	Receivable Company 💌	Company	- Alpha Agency	Look Up	ď	
	Sort By: Invoice #	g acro	For: Invoice Date '- From 1/1/2001	2001 Tel 5/31/2001		
FIG.2/	Show Closed Inv. (Entry Only)	sed Inv. (Er	ntry Only) Payment Summary '+	Update O	0	
			SelectAll	Delete		
	Invoice #	Check #	Check # Insured	Inv. Date Pmt. Date Paid/Rec'd	Amount	17
	L		ABC Grill	1/22/2001 2/1/2001 Rec'd	经8.001	
	P 00V105		Per Se Technologies	1/22/2001 2/12/2001 Rec'd	581 00s	
	L 00V10S		Per Se Tachnologies	1/22/2001 2/12/2001 Rec'd	2612 88	- 6
	T 00V10S		Per Se Technologies	1/22/2001 2/12/2001 Rec'd	Sgr .	
	7 01A444		Per Se Technologies	1/22/2001 2/12/2001 Rec'd	€87 ° ° ° ° ° ° ° ° ° ° ° ° ° ° ° ° ° ° °	
	F 01A444		Per Se Technologies	1/22/2001 2/12/2001 Rec'd	3024 👺	(37)
	7 01,8444		Per Se Technologies	1/22/2001 2/12/2001 Rec'd	3124	
	P 01C101	5740	ABC Grill	1/22/2001 2/20/2001 Rec'd	37.6.7.6	
	7 011136	5740	ABC Grill	1/22/2001 2/20/2001 Rec'd	器 506	File
	F 011136	5740	ABC Gull	1/22/2001 2/20/2001 R+c'd	1005 kg	
	L 129	5740	ABC Gull	1/18/2001 2/20/2001 Rec'd	1495	
	F 130	5740	ABC Grill	1/19/2001 2/20/2001 Rec'd	3150 %	
	L 134	5740	ABC Gull	1/22/2001 2/20/2001 Rec'd	Sa 27.6	· · · · ·
	T p450	5750	Mano's Pizza	1/19/2001 2/1/2001 Rec'd	9813,43 📽	
	☐ p450	5750	Mane's Pizza	1/19/2001 2/1/2001 Rec'd	9813.43	

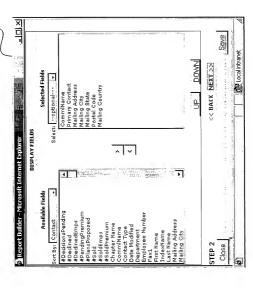
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Carrier Statement	Ħ									
Busmess from 2/1/2001 to 2/28/2001	001 to 2/2	8/2001						g	Thursday, June 14, 2001	14, 2001
TO: Mutual lisurance Company 1 Insurance Way IL, Glencoe 60033 Phone: 547-509-7898 Fax 347-509-7898	pany ax 847.909.	3882			FROM: SINTECH SOFTWARE 180 N Methgan Ave Suite 620 Chicago, IL. 69601 Phone: 312-499-5150 Fex: 312-499-5160	IWARE Ave Suite 6 601 5150 Fex. 31	20			
Producer Bill Insured Policy#	Trans Type	Coverage	Effective Date	Ехрітатівн Date	Premium	Fees ⁺ G	Feest Gross Comm.	% Gross	Paid To _D Company	Paid To Due Company Company
City Florists 3882011 Carrier Subtotal	RNW	NG.	2/8/2001	2/8/2002	13,100 00 13,100.00	000	(2,860.00) (2,860.00)	22 00%	00'0	10,240.00 10,240.00
Carrier Total					13,100.00	000	(2,860,00)		000	10,240.00

FIG.28

\$11,925.00 11,925 00 ADJ ADJ SINTECH SOFTWARE
180 N Michigan Ave Suite 620
Chicago, IL. 60601
Phone: 312-499-5150 Fez. 312-499-5160 Producer Open Item Statement Business from 2/1/2001 thru 2/28/2001 Creedits Connect Press (0,560.00) (1,560.00) Charges Pre+Fes 13,485.00 13,485.00 Open Invoices and Current Activity Invoice Bute Char 2/8/2001 Producer Statement - Microsoft Internet Explorer Coverage 01 C101 FC Tools Help Chicago, IL 60605 Phone: 312-499-5151 Fax 312-499-5151 Open Items(1) froured
Company
Cary House
Cary Boules
Mittal hourese Company 382011 Yew Favorites Alpha Agency 37 State Street State 652 蓝 TOTAL

	232
Report Builder - Mi	③Report Builder - Microsoft Internet Explorer
	WELCOME to Report Builder!
▶ Report Name:	test
▶ Description:	This is a test raport that contains Polides and Insureds.
•	M hake this report read-only for other users:
Last Modified:	5/1/2001 2,55:00 PM
STEP 1	<< BACK NEXT>>
Close	Save



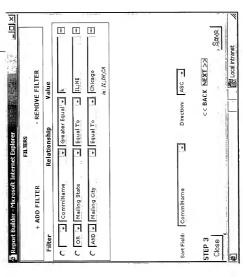


FIG.32

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Manual Annual Control Annual Contr	Last Name First Name	Phone1
Michael Stage of forms Michael Stage of form	Kenwood Mike	(258) 896-5552
The control of the co	McNurlin Mike	(258) 896-5552
5 5 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7	:	(203) 555-2900
Service Back div		

FIG.34

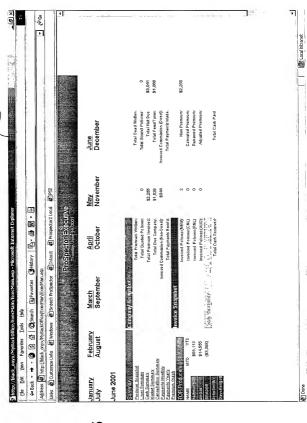


FIG.35